



REQUEST FOR STATEMENTS OF QUALIFICATIONS (RSQ)

Construction Cost Estimator

RSQ Number:	11-0024	Response Due Date	August 31, 2011
RSQ Issue Date:	August 11, 2011	Response Due Time:	3:00 p.m.
Pre-Response Conference Date	None	Senior Contracting Officer	Susan Dugan

The County, in fulfillment of its interest and desire to realize maximum competition throughout its procurement program, invites and encourages your participation in this competitive purchasing action. If, after review of all requirements you decide not to participate in this solicitation at this time, or would prefer not to receive further notices of solicitations for services of this type, please mark the appropriate space immediately below and return this sheet only.

_____ Not interested at this time; please keep our firm on your List for future requests for this service.

_____ Please remove our firm from your Bidder's List for this type of service.

The respondent hereby agrees to furnish the services pursuant to all requirements, specifications, and scope of services contained in this solicitation document, and further agrees that the language of this document shall govern in the event of a conflict with his or her response. By my signature I certify that this response is made without prior understanding, agreement, or connection with any corporation, firm, business entity, or person submitting a response for the services, and is in all respects fair and without collusion or fraud.

THIS FORM MUST BE SIGNED TO BE CONSIDERED FOR AWARD

COMPANY NAME:		DATE:
MAILING ADDRESS:		PHONE:
		FAX:
CITY:	STATE:	ZIP:
SSN OR FEDERAL TAX NO:	TITLE OF AUTHORIZED REPRESENTATIVE:	
E-MAIL:		WEB URL:
AUTHORIZED SIGNATURE:		PRINTED NAME:

Electronic Payment: Please certify whether the bidder will accept payment processed through the County's VISA-based electronic payment system: ☐ Yes ☐ No (Check one)

DUNS Number (Insert if this action involves a federal funded project): _____

SECTION 1.0 – SCOPE OF WORK AND SPECIFIC CONTRACT REQUIREMENTS

1.1 Purpose

The Lake County Board of County Commissioners is soliciting statements of qualifications and letters of interest from firms that have extensive experience in State of Florida with providing construction cost estimating and construction management analysis services (Consultant).

The contract(s) resulting from this solicitation will be for:

_____ a single project undertaking

or

X on-call services on an as-required basis. In this regard, the County reserves the right to make multiple awards if deemed appropriate considering anticipated workload or other factors. At this time, it is the County's intent to award to one (1) vendor in response to this solicitation.

Respondents are advised that any award under this solicitation will be by separate bilateral contract.

1.2 Scope of Work

The Lake County Department of Facilities Development and Management is responsible for the design, construction, and facility maintenance of over 140 County owned buildings and over 30 leased spaces. Owned facilities are as small as 248 square feet up to 200,000 square feet. Our largest lease space is approximately 14,000 square feet.

The Consultant shall provide various cost estimating and construction analysis services including, but not limited to:

- Capital construction budgeting and master planning estimates including life cycle costing and operational costs;
- Value engineering suggestions and alternative design costs analysis and proposals;
- Detailed cost estimated by construction division at schematic design, design development and construction document phases of design;
- Construction schedule review with and without construction expenditure/cash flow projections;
- Construction Manager or General Contractor bid/Guaranteed Maximum Price analysis to include but not limited review of general conditions, construction schedules and milestones, documents, bidders (prequalified, solicited, selected), bid package preparation and scope of work documentation, unit prices, and bid analysis and recommendations;
- Schedule of values review and analysis;
- Change order evaluation;
- Auditing and claims analysis;
- Facilities condition assessments with budgetary cost estimates;
- Cost Estimating associated with disaster related facilities damages;
- Expert witness services or testimony.

The estimator's duties may involve providing preliminary and/or detailed cost estimating maintenance replacement/repair projects such as roof repair, M.E.P., fire alarm and security system upgrades. Existing structure and lease spaces may require cost estimating for exterior and /or interior renovations or

additions, and cost estimates for proposed projects for future development.

These services shall require the Consultant to produce independent, objective, conceptual and detailed work products that will be used by the County for evaluating, negotiating, and otherwise resolving requests, payment applications, change orders and claims made by construction contractors as well as determine budgets and budget compliance.

Because of the variety of projects and scopes of work, Lake County is interested in contracting with qualified individuals or firms for small projects as well as with firms that specialize in large scale complex estimating and analysis.

1.3 Qualifying Standards

The estimator must have the relevant experience in utilizing the various elements of cost estimating (quantity take offs, labor hours and rates, material pricing, equipment costs, subcontractor quotes, indirect costs, and profit amount) and in utilizing various cost estimating methods.

The cost estimator shall have at least five (5) years as an American Society of Professional Estimator, a Chartered Surveyor, or as a CPE certification, and have experience in cost benefit analysis of building systems, especially relating to green buildings and sustainable design.

1.4 Period of Performance / Term of Contract

The contract resulting from this solicitation will form a “continuing contract” and will commence on the first calendar day of the month succeeding approval of the contract by the Board of County Commissioners, or designee, unless otherwise stipulated by the County. Actual start of performance is contingent upon the completion and submittal of all required award-related documents. The initial contract term shall be twelve (12) months, and then the contract will remain in effect until completion of the expressed and/or implied warranty period. The contract prices resultant from this solicitation shall prevail for the full duration of the total contract term unless otherwise indicated elsewhere in this document.

1.5 Option to Renew

Prior to, or upon completion, of the initial term of this contract, the County shall have the option to renew this contract for two (2) additional one (1) year periods. The vendor shall maintain, for the entirety of the stated additional period(s), the same prices, terms, and conditions included within the originally awarded contract. Continuation of the contract beyond the initial period, and any option subsequently exercised, is a County prerogative, and not a right of the vendor. This prerogative may be exercised only when such continuation is clearly in the best interest of the County.

1.6 Key Contractor Personnel

In submitting a qualifications package, the respondent is representing that each person listed or referenced in the qualifications package shall be available to perform the services described for the County, barring illness, accident, or other unforeseeable events of a similar nature in which case the respondent must be able to promptly provide a qualified replacement. In the event the respondent wishes to substitute personnel, the respondent shall propose a person with equal or higher qualifications and each replacement person is subject to prior written County approval. In the event the requested substitute person is not satisfactory to the

County and the matter cannot be resolved to the satisfaction of the County, the County reserves the right to cancel the contract for cause.

1.7 Insurance Requirements

Each vendor shall include in its solicitation response package proof of insurance capabilities, including but not limited to, the following requirements: [This does not mean that the vendor must have the coverage prior to submittal, but, that the coverage must be in effect prior to a purchase order or contract being executed by the County.]

An original certificate of insurance, indicating that the awarded vendor has coverage in accordance with the requirements of this section, shall be furnished by the vendor to the Contracting Officer within five (5) working days of such request and must be received and accepted by the County prior to contract execution and/or before any work begins.

The vendor shall provide and maintain at all times during the term of any contract, without cost or expense to the County, policies of insurance, with a company or companies authorized to do business in the State of Florida, and which are acceptable to the County, insuring the vendor against any and all claims, demands or causes of action whatsoever, for injuries received or damage to property relating to the performance of duties, services and/or obligations of the vendor under the terms and provisions of the contract. The vendor is responsible for timely provision of certificate(s) of insurance to the County at the certificate holder address evidencing conformance with the contract requirements at all times throughout the term of the contract.

Such policies of insurance, and confirming certificates of insurance, shall insure the vendor is in accordance with the following minimum limits:

General Liability insurance on forms no more restrictive than the latest edition of the Occurrence Form Commercial General Liability policy (CG 00 01) of the Insurance Services Office or equivalent without restrictive endorsements, with the following minimum limits and coverage:

Each Occurrence/General Aggregate	\$1,000,000/2,000,000
Products-Completed Operations	\$2,000,000
Personal & Adv. Injury	\$1,000,000
Fire Damage	\$50,000
Medical Expense	\$5,000
Contractual Liability	Included

Automobile liability insurance, including owned, non-owned, and hired autos with the following minimum limits and coverage:

Combined Single Limit	\$1,000,000
-----------------------	-------------

Workers' compensation insurance based on proper reporting of classification codes and payroll amounts in accordance with Chapter 440, Florida Statutes, and/or any other applicable law requiring workers' compensation (Federal, maritime, etc). If not required by law to maintain workers compensation insurance, the vendor must provide a notarized statement that if he or she is injured; he or she will not hold the County responsible for any payment or compensation.

Employers Liability insurance with the following minimum limits and coverage:

Each Accident	\$1,000,000
Disease-Each Employee	\$1,000,000
Disease-Policy Limit	\$1,000,000

Professional liability and/or specialty insurance (medical malpractice, engineers, architect, consultant, environmental, pollution, errors and omissions, etc.) insurance as applicable, with minimum limits of \$1,000,000 and annual aggregate of \$2,000,000.

The following additional coverage must be provided if a dollar value is inserted below:

Loss of Use at coverage value: \$ _____

Garage Keepers Liability at coverage value: \$ _____

Lake County, a Political Subdivision of the State of Florida, and the Board of County Commissioners, shall be named as additional insured as their interest may appear on all applicable liability insurance policies.

The certificate(s) of insurance shall provide for a minimum of thirty (30) days prior written notice to the County of any change, cancellation, or nonrenewal of the provided insurance. It is the vendor's specific responsibility to ensure that any such notice is provided within the stated timeframe to the certificate holder.

Certificate(s) of insurance shall identify the applicable solicitation (ITB/RFP/RFQ) number in the Description of Operations section of the Certificate.

Certificate holder shall be:

LAKE COUNTY, A POLITICAL SUBDIVISION OF THE STATE OF FLORIDA, AND
THE BOARD OF COUNTY COMMISSIONERS.
P.O. BOX 7800
TAVARES, FL 32778-7800

Certificates of insurance shall evidence a waiver of subrogation in favor of the County, that coverage shall be primary and noncontributory, and that each evidenced policy includes a Cross Liability or Severability of Interests provision, with no requirement of premium payment by the County.

The Vendor shall be responsible for subcontractors and their insurance. Subcontractors are to provide certificates of insurance to the prime vendor evidencing coverage and terms in accordance with the Vendor's requirements.

All self-insured retentions shall appear on the certificate(s) and shall be subject to approval by the County. At the option of the County, the insurer shall reduce or eliminate such self-insured retentions or the vendor or subcontractor shall be required to procure a bond guaranteeing payment of losses and related claims expenses.

The County shall be exempt from, and in no way liable for, any sums of money, which may represent a deductible or self-insured retention in any insurance policy. The payment of such deductible or self-insured retention shall be the sole responsibility of the vendor and/or sub contractor providing such insurance.

Failure to obtain and maintain such insurance as set out above will be considered a breach of contract and may result in termination of the contract for default.

Neither approval by the County of any insurance supplied by the vendor or Subcontractor(s), nor a failure to disapprove that insurance, shall relieve the vendor or Subcontractor(s) of full responsibility for liability, damages, and accidents as set forth herein.

SECTION 2.0 – GENERAL TERMS AND CONDITIONS

2.1 Definitions

“Request for Statements of Qualifications (RSQ)” means a formal solicitation inviting statements of qualifications.

“Response” means the information submitted by the respondent in response to this RSQ.

“Respondent” means the person, firm, or corporation who submits a response.

“County” means Lake County, Florida.

“Board of County Commissioners” or “BCC” means the governing Board of Lake County, Florida.

“Contractor” means a respondent awarded a contract from this solicitation.

“You” and “your” mean the same as the term “respondent” above.

“Shall”, “must”, or “will” are equivalent in this RSQ and indicate a mandatory requirement or condition, the material deviation from which shall not be waived by the County.

“Should” or “may” are equivalent in this RSQ and are permissive in nature. Deviation from such a condition or requirement will not by itself cause automatic rejection of a qualifications package, but may be a factor considered in the overall evaluation process.

2.2 General Qualification Guidance

Receipt of this document does not indicate that the Procurement Services office has pre-determined your company's qualifications to receive a contract award. Such determination will be based on evaluation of your qualifications package compared to the specific requirements and qualifications contained in this document.

The Contracting Officer listed on the face page will be responsible for the selection process and will be the sole point of contact for all respondents. In addition to the materials provided in the written responses to this RSQ, the County may utilize site visits or may request additional material, information, presentations or references from the respondent(s) that submitted qualifications packages.

2.3 Incurred Expenses

This RSQ does not commit the County to make an award nor shall the County be responsible for any cost or expense which may be incurred by any respondent in preparing and submitting a qualifications package or offer, or any cost or expense incurred by any respondent prior to the execution of a purchase order or contract agreement. By submitting a qualifications package, the respondent agrees that all costs associated with the preparation of the qualifications package will be solely the respondent's responsibility. The respondent also agrees that the County bears no responsibility for any costs associated with the preparation of the qualifications package, preparing and delivering presentations, and/or any administrative or judicial proceedings resulting from this solicitation process.

2.4 Minor Irregularities

The County reserves the right to waive minor irregularities in submitted qualifications packages when such action is in the best interest of the County. Minor irregularities are defined as those that have no adverse effect on the County's best interests, and will not affect the outcome of the selection process by giving the respondent an advantage or benefit not enjoyed by other respondents.

2.5 Collusive Responses

The respondent certifies, by submission of a response, that its response is made without any previous understanding, agreement or connection with any person, firm or corporation making a response for the same service with prior knowledge of competitive prices, and is in all respects fair, without outside control, collusion, fraud or otherwise illegal action. Any evidence of collusion among respondents and prospective respondents acting to illegally restrain freedom of competition by agreement to offer a fixed price, or otherwise, will render the responses of such responders void.

2.6 Conflict Of Interest

If any officer, director, or agent of your organization is also an employee of the Lake County Board of County Commissioners, then you shall clearly identify in your response the name of the individual(s) and the position he or she holds in your organization. Further, you shall disclose the name(s) of any County employee(s) who owns, directly or indirectly, any interest in your organization or any of its branches. This does not include stock in a publicly traded organization unless the individual holds more than a ten percent (10%) stake. You shall complete and have notarized a Conflict of Interest Form (Form A-1) and include it in your qualifications package.

If there is a conflict of interest as defined above and by Chapter 112, Part III, Florida Statutes, Code of Ethics for Public Officers and Employees, the issue will be addressed to the County Attorney Office for review and opinion whether or not the respondent can be considered for award.

2.7 Public Entity Crimes

Pursuant to Section 287.132 and 287.133, Florida Statutes, the County, as a public entity, may not consider a qualifications package from, award any contract to, or transact any business in excess of the threshold amount set forth in Section 287.017, Florida Statutes, with any person or affiliate on the convicted contractor list for the time periods specified unless such person has been removed from the list pursuant to law. By submitting a qualifications package in response to this RSQ, the respondent is certifying that it is eligible for award under this solicitation pursuant to Section 287.132 and 287.133, Florida Statutes.

2.8 No Confidentiality of Information

When the qualifications package is opened, it becomes a public record, except as listed below. All material submitted becomes the property of the County and may be returned only at the County's option. The County has the right to use any or all ideas presented in any reply to this ITB. Selection or rejection of a qualifications package does not affect this right.

The County is governed by the Public Records Law, Chapter 119, Florida Statutes (F.S.). Only trade secrets as defined in Section 812.081, F.S., will be exempt from disclosure. If a respondent submits trade secret information, the information must be segregated and each pertinent page must be clearly labeled "trade

secret.” The County will maintain the confidentiality of such trade secrets to the extent provided by law. If a respondent labels all or most pages “trade secret”, the Respondent may not be considered for award.

Also pursuant to Section 119.071 (c), F.S., financial statements will be exempt from examination by anyone other than legally authorized County employees or agents. The County will maintain the confidentiality of such financial data to the extent provided by law.

SECTION 3.0 – SUBMITTAL OF RESPONSE AND AWARD

3.1 Response Location, Date, and Time

The vendor response to this solicitation, along with the specified number of copies, shall be received at the specified location, date, and time specified on the front page of this solicitation. Any original response package received at the specified location after the specified date and time will not be considered and will be returned unopened to the submitter at the submitter’s expense.

3.2 Delivery of Qualifications Packages

Unless the Qualifications Package is delivered in person by a person from the responding organization, **ALL** incoming mail from the U.S. Postal Service and any package delivered by a third party delivery organization (Fed-Ex, UPS, DHL, private courier, etc.) will be opened for security and contamination inspection by the Lake County Clerk of the Circuit Court Mail Receiving Center in an off-site secure controlled facility **PRIOR** to delivery to any Lake County Government facility, which includes the Lake County Procurement Services office. Each package shall be clearly marked with RSQ number, title, and company name. To be considered for award, a bid or proposal must be received and accepted in the Procurement Services office prior to the date and time established within the solicitation. A response will not be considered for award if received in the Procurement Services office after the official due date and time regardless of when or how it was received by the Lake County Clerk of Court Mail Receiving Center. Allow sufficient time for transportation and inspection.

If you plan on bringing your Qualifications Package **IN PERSON**, please bring it to:

LAKE COUNTY PROCUREMENT SERVICES
315 W. MAIN STREET
4TH FLOOR, ROOM 441
TAVARES, FLORIDA 32778

If you submit your Qualifications Package by the **U. S. POSTAL SERVICE**, please mail it to:

LAKE COUNTY PROCUREMENT SERVICES
PO BOX 7800
TAVARES, FL 32778-7800

If you submit your Qualifications Package by a **THIRD PARTY CARRIER** such as **Fed-Ex, UPS, DHL, or a private courier**, please address it to:

LAKE COUNTY PROCUREMENT SERVICES
MAIL RECEIVING CENTER

32400 COUNTY ROAD 473
LEESBURG, FL 34788

NOTE: Submission via facsimile (fax) or email or other electronic media will not be accepted.

3.3 Public Opening of Responses on Specified Due Date

At the date and time specified, all timely qualifications packages that have been accepted by the County will be formally opened and conditionally accepted for consideration. The names of the firms submitting packages will be read aloud and recorded. Individuals covered by the Americans with Disabilities Act of 1990 in need of accommodations to attend public openings or meetings should contact the Procurement Services office at least five (5) days prior to the scheduled response due date.

3.4 Questions Concerning This Solicitation:

Questions concerning any portion of this RSQ shall be directed in writing [fax and e-mail accepted] to the below name individual who shall be the official point of contact for this RSQ. To ensure reply, questions should be submitted at least seven (7) days before the response due date.

Susan Dugan, Senior Contracting Officer
Lake County BCC
Procurement Services
315 W. Main Street, Room 441
PO BOX 7800
Tavares, FL 32778-7800
Phone: 352.343.9839, Fax: 352.343.9473,
E-mail: sdugan@lakecountyfl.gov

Failure by a potential respondent to ask questions or request changes by the date indicated above shall constitute the respondent's acceptance of the requirements set forth in this RSQ. No answers provided by any party given in response to questions submitted shall be binding upon this RSQ unless released in writing as an addendum to the RSQ by the Procurement Services office.

3.5 Respondents Responsibility / Clarification and Addenda

While the County has used considerable efforts to ensure an accurate representation of information in this RSQ, each prospective respondent is urged to conduct its own investigations into the material facts and the County shall not be held liable or accountable for any error or omission in any part of this RSQ. It is incumbent upon each prospective respondent to carefully examine these requirements, terms, and conditions. A respondent, by submitting a qualifications package, represents that the respondent has read and understands the Request for Qualifications requirements and its response is made in accordance therewith and that the respondent is familiar with the local conditions under which the awarded Respondent must perform. Any inquiries, suggestions, or requests concerning interpretation, clarification or additional information shall be made in writing [fax 352-343-9473 or e-mail are acceptable] in accordance with procedures set forth herein. The County will not be responsible for any oral communication given by any employee, agent, or representative of the County. The issuance of a written addendum is the only official method by which interpretation, clarification or additional information can be given.

If the County revises (amends) this RSQ, notice will be posted on the Lake County Internet site:

You must acknowledge each addendum in your proposal. Failure to acknowledge each addendum may prevent your proposal from being considered for award. It is solely your responsibility to ensure that you have received all addenda to this RSQ before submitting your proposal.

Before submitting a qualifications package, each respondent shall make all investigations and examinations necessary to ascertain site conditions and requirements affecting the full performance of the contract and to verify any representations made by the County upon which the respondent will rely. If the respondent receives an award, failure to have made such investigations and examinations will in no way relieve the respondent from its obligations to comply in every detail with all provisions and requirements of the contract, nor will a plea of ignorance of such conditions and requirements be accepted as a basis for any claim by the respondent for additional compensation or relief.

3.6 Restricted Discussions

From the date of issuance of this solicitation until final County action, vendors should not discuss the solicitation or any part thereof with any employee, agent, or any other representative of the County except as expressly authorized by the designated procurement representative. The only communications that shall be considered pertinent to this solicitation are appropriately signed written documents from the vendor to the designated procurement representative and any relevant written document promulgated by the designated procurement representative.

3.7 Specific Directions Regarding Format and Contents of Response

Firms, organizations, joint ventures, or individuals interested in submitting a qualifications package (offer) in response to this RSQ shall submit one (1) original, marked "ORIGINAL," and five (5) copies, each marked "COPY," of their qualifications package for review and evaluation by the County. **The vendor shall submit their response within a sealed envelope or package clearly marked with the vendor's name and the solicitation number on the outside of the envelope or package.** Failure to provide the required copies and information may result in the qualifications package not being considered.

To facilitate analysis of its qualifications package, the respondent shall prepare its qualifications package in accordance with the instructions outlined in this section. If the respondent's qualifications package deviates from these instructions, such response may, in the County's sole discretion, be rejected. The County emphasizes that the respondent concentrate on accuracy, completeness, and clarity of content.

3.7.1 Economy of Presentation

Each qualifications package shall be prepared simply and economically, providing a straightforward and concise description of the respondent's capabilities regarding the conditions and requirements of the specific work to be performed pursuant to this RSQ. Elaborate bindings, colored displays, and any superfluous promotional material are not desired, and at a level considered unwarranted by assigned evaluators, may serve as evidence of cost inefficiency supportive of a lower technical rating. Emphasis in each qualifications package must be on completeness and clarity of content. To expedite the evaluation of qualifications packages, it is **mandatory** that respondent follow the format and instructions contained herein. The County retains the prerogative to reject any response that does not essentially conform to the stated requirements.

3.7.2 Qualifications Package Guidelines

Cross Referencing - To the greatest extent possible, each section shall be written on a stand-alone basis so that its contents may be evaluated with a minimum of cross-referencing to other sections of the qualifications package. Information required for evaluation of qualifications, which is not found in its designated section, will be assumed to have been omitted from the qualifications package.

Abbreviations and Acronyms – All abbreviations and acronyms used in the qualifications package shall be explained and/or defined upon their first usage in each section of the qualifications package.

Page Limitation, Size, and Format – Responses are limited to a total page count not to exceed 50 pages. This count includes all response content to include completed County Forms 1A, and 1 through 6, but excluding tab sheets, covers, or any County-issued addenda pages. Page size shall be 8.5 x 11 inches, not including foldouts. Pages may be single-spaced. The text size should be 11 point or larger. Use at least one (1) inch margins on the top and bottom and three-quarter (3/4) inch side margins. Pages shall be numbered sequentially by section.

Legible tables, charts, graphs and figures shall be used wherever practical to depict organizations, systems and layouts, implementation schedules, plans, etc. These displays shall be uncomplicated, legible and shall not exceed eleven (11) by seventeen (17) inches in size. Foldout pages shall fold entirely within the section, and count as a single page. Foldout pages may only be used for large tables, charts, graphs, diagrams, and schematics, and not for pages of text.

Binding and Labeling – The entirety of the qualifications package should be spiral bound on the left margin to permit the qualifications package to lie flat when opened. All response sections must be appropriately separated and tabbed. Staples shall not be used.

3.7.3 Qualifications Package Sections

The respondent shall organize its qualifications package into the following major sections.

COUNTY’S RSQ COVER SHEET

- TAB A STATEMENT OF INTEREST: To be submitted on the firm's letterhead.
The statement of interest shall:
- Concisely state the firm's understanding of the services required by the County.
 - Include additional relevant information not requested elsewhere in the RSQ.
 - The signature on the statement shall be that of a person authorized to bind the firm.

Tab A shall also contain a properly completed, signed, and notarized Form A-1, Conflict of Interest Disclosure Form.

- TAB B FIRM PROFILE: Include completed Form 1 and a copy of the respondent’s current State of Florida Board of Professional Regulation License. .

- TAB C TEAM COMPOSITION AND SUBCONSULTANTS: Complete Form 2. List the key people proposed for the County’s project along with any proposed sub

consultants. Include a copy of each person's current State of Florida Board of Professional Regulation License. Additional resumes and/or information about the individuals proposed on this team may be attached but will be included in the total page count.

Provide documentation that the proposed estimator has the relevant experience in utilizing the various elements of cost estimating (quantity take offs, labor hours and rates, material pricing, equipment costs, subcontractor quotes, indirect costs and profit amount) and in utilizing various cost estimating methods.

Provide evidence of five (5) years as an American Society of Professional Estimator, a Chartered Surveyor, or as a CPE certification, and have experience in cost benefit analysis or building systems, especially relating to green buildings and sustainable design.

TAB D LOCATION AND PERCENTAGE OF WORK TO BE COMPLETED:
Complete Form 3.

TAB E SIMILAR PROJECTS: Complete Form 4. This form may be reproduced.

TAB F VOLUME OF WORK: Complete Form 5.

TAB G ADDITIONAL INFORMATION: Complete Form 6.

3.8 Withdrawal of Qualifications Package

You may withdraw your qualifications package or modify it at any time prior to the official response due date and time. You shall be required to produce photo identification that satisfies the County prior to withdrawal or modification of your qualifications package. Negligence upon your part in preparing your qualifications package confers no right of withdrawal after the time fixed for the submission of qualifications packages.

3.9 Qualifications Package Acceptance / Rejection

The County reserves the right to accept or reject any or all qualifications packages received as a result of this RSQ, or to negotiate separately with competing contractors. The County reserves the right to waive any informalities, defects, or irregularities in any qualifications package, or to accept that qualifications package, which in the judgment of the proper officials, is in the best interest of the County and the citizens of Lake County.

3.10 Discussions and/or Presentations After Initial Response

The County, at its sole discretion, may conduct discussions with, and/or require formal presentations by, any respondent without charge to the County. The County reserves the right to require any respondent to demonstrate to the satisfaction of the County that the respondent has the fiscal and technical ability to furnish the service(s) or product(s) as proposed. The County shall be the sole judge of compliance in this regard. The County reserves the right to conduct discussions with any respondent(s) which has (have) been "short-

listed” as a most-qualified respondent.

Respondents are cautioned not to assume that they will be asked for discussions or a presentation and should include all pertinent and required information in their original qualifications package.

Discussions and/or presentations shall follow the spirit and intent of provision 3.7.1 above. Any formal presentations that are overly elaborate and appear to rely more on the technical manner of presentation rather than on the actual content of presentation will be subject to lesser technical ranking. The discussion and/or presentation shall be focused on the essentials of the project itself, and, unless requested by the respondent and approved by the County, shall include no more than three representatives from the respondent, one of whom shall be the respondent’s proposed project manager for the effort to be performed. Any additional attendees must have a documented direct function in the work to be performed.

Upon completion of discussions and/or presentations with short-listed respondents, the County will determine which one (or more in the case of a multiple award continuing contract) of those respondents is considered the best qualified for the specific work being solicited. Pricing negotiations will then ensue with the top ranked respondent(s).

3.11 Award of Contract(s)

The County reserves the right to reject any or all responses, to waive any minor informality or irregularity in any response, and to make award to the response deemed to be most advantageous to the County within the selection factors and process cited.

It is understood that the County is not obligated to make an award under or as a result of this RSQ or to award such contract, if any, on the basis of lowest cost or one factor alone. The County reserves the right to award such contract, if any, to the best qualified respondent(s).

The County has the sole discretion, and reserves the right, to cancel this RSQ, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the County's best interests to do so.

Any qualifications package that is contingent upon an award or a contract for any additional service shall be rejected and not considered for an award.

In the event of default by the awarded Respondent, the County reserves the right to negotiate and award the contract to the next best qualified Respondent without any further competition.

3.12 Time Limit To Submit Required Award or Initial Performance Related Documentation

Within ten (10) calendar days after County notification of intent to award, or subsequent intent to proceed, any successful respondent must furnish all deliverables or documentation required to specifically support the County intent. If any successful respondent fails to furnish the required deliverables within the required time frame, intent to award or award to that respondent may be withdrawn and award made to the next highest rated respondent.

3.13 Disputes/Exceptions

Any prospective respondent who disputes the reasonableness or appropriateness of any item within this RSQ document, any addendum to this RSQ document, notice of award or notice of rejection shall set forth the specific reason and facts concerning the dispute, in writing, within five (5) business days of the County’s

issuance of the qualifications package document or addenda, or notice of award or rejection. The written dispute shall be sent via certified mail or delivered in person to the County's Procurement Director, who shall administer the matter in the manner currently expressed in the County's formal protest procedure. However, respondents are advised that any protest based exclusively on disagreement with the technical judgment of evaluators is subject to be rejected unless there is clear evidence of arbitrary or capricious action in that regard.

Any prospective respondent who may have any exceptions to any requirements set forth in this RSQ or the scope of work may identify the item(s) that exception is taken to, including the reason and include these item(s) in a separately marked section of their submitted qualifications package. All such exceptions shall be evaluated by the County personnel involved in the review and evaluation process. It is recommended that any such exception or deviation be addressed to the assigned contracting officer in writing during the solicitation period.

FORM A-1

CONFLICT OF INTEREST DISCLOSURE FORM

I HEREBY CERTIFY that

1. I (*printed name*) _____ am the (*title*) _____ and the duly authorized representative of the firm of (*Firm Name*) _____ whose address is _____, and that I possess the legal authority to make this affidavit on behalf of myself and the firm for which I am acting; and,
2. Except as listed below, no employee, officer, or agent of the firm have any conflicts of interest, real or apparent, due to ownership, other clients, contracts, or interests associated with this project; and,
3. This proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services, and is in all respects fair and without collusion or fraud.

EXCEPTIONS (List)

Signature: _____

Printed Name: _____

Firm Name: _____

Date: _____

Sworn to before me this _____ day of _____ 2011.

,Personally known _____

OR Produced identification _____ Notary Public - State of _____

_____ My Commission expires _____

(Type of Identification)

(Printed, typed or stamped commissioned name of Notary Public)

FORM 1

FIRM PROFILE

1. Firm (or joint venture) Name and Primary Corporate Address	1c. Licensed to do business in the State of Florida _____ Yes _____ No
	1c. Registered to do business in the State of Florida _____ Yes _____ No
	1d. Name, Title & Telephone Number of Principal to Contact
1a. Firm is ____ National ____ Regional ____ Local FEIN # _____	
1b. Firm is a Certified Minority Business Enterprise _____ Yes _____ No	
2. Please list the number of people by discipline that your firm/joint venture will commit to the County's project.	
3. If submittal is by joint venture list participating firms and outline specific areas of responsibility (including administrative, technical, and financial) for each firm:	
3a. Has this joint venture previously worked together? _____ Yes _____ No	

Form 2

TEAM COMPOSITION

Role	Name and City of Residence of individual assigned to the project	Florida Active Registrations Number
R		

FORM 3

LOCATION

1. Specify address of designated office where the majority of work on this project will be performed:
2. Indicate percentage of total over-all project fees projected to be performed on this project by the the office specified above. (Do not include percentage of fees anticipated to be performed on this project by sub-consultants)

_____ %

3. Specify address of other office(s) where any part of the work on this project will be performed (if applicable):

4. Indicate percentage of total over-all fees projected to be performed on this project by the office specified above. (Do not include percentage of fees anticipated to be performed on this project by sub-consultants.)

_____ %

5. Indicate percentage of total over-all fees projected to be performed on this project by firms **located within Lake County** including the prime consultant and sub-consultants, utilizing information supplied above and on Form 2.

_____ %

PROFESSIONAL PERSONNEL FOR SIMILAR PROJECTS

Work by firm or joint venture members which best illustrate current qualifications relevant to the County's project that have been/is being accomplished by personnel that shall be assigned to the County's project. List no less than three (3) but no more than ten (10) projects.

4. <u>Project Name & Location</u>		<u>Project Owners Name & Address</u>
<u>Project Manager:</u>		
<u>Completion Date (Actual or Estimated)</u>		
<u>Estimated Cost (In Thousands)</u>		<u>Project Owner's Contact Person, Title, & Telephone Number</u>
Entire Project	Work for which firm was/is responsible	
\$	\$	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible)		
<u>Nature of Firm's Responsibility in Project</u> (Please give quantitative indications wherever possible)		
<u>Firm's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the County's Project</u>		

FORM 5

Prime Consultant's volume of work performed for the Lake County Board of County Commissioners
currently and previously

Name of Project (include continuing contracts)	Prime or Sub	Total Contracted Fee Amount	Approximate date of award of contract

FORM 6

Use this space to provide any additional information or description of resources (including any design capabilities) supporting your firm's qualifications for the County's project.

The foregoing is a statement of facts.

Signature: _____

Telephone Number: _____ Date: _____

Typed Name and Title: _____